



GREATER PHILADELPHIA
FOOD SYSTEM STUDY

Study Advisory Committee Meeting

June 5, 2008

1:00 pm

SMALL GROUP DISCUSSION RESULTS

Each group was asked the following three questions regarding the interviews in the policy network analysis:

1. What should we ask?
Top three
On board
On notecards
2. How should we ask?
3. Who should we ask? (see excel sheet "6_5 referrees")

Distributors/Retail Group

Top three

1. Has the food industry felt the demand for local food?
2. What's the biggest challenge in transportation and distribution (labor, fuel costs, supply etc)?
3. How do supermarkets make their buying decisions?
4. Where do consumers shop/how far are they willing to travel/what is most important (quality, price, etc)?

On Board (with votes)

- Has the food industry felt the demand for local food? (5)
- What's the biggest challenge in transportation and distribution (labor, fuel costs, supply etc)? (4)
- How do supermarkets make their buying decisions? (3)
- Where do consumers shop/how far are they willing to travel/what is most important (quality, price, etc)? (3)
- Do fresh food retailers face difficulty in maintaining profits? (2)
- What's flowing in and out through the trans/dist system and why? (2)
- How does local food compete for consumers? (1)
- What is local food? (1)
- How does transportation/distance affect purchasing for consumers? (1)
- Should we prevent the trans/dist of something that is economic for the seller but not best for the region? (1)
- Why are so many food processors located here? (1)
- Are we losing or gaining food processors? (1)
- Do fresh food retailers expand their purchasing area to maintain profits? (0)
- How do fresh food retailers compete with pricing? (0)
- How do fresh food retailers maintain inventory? (0)
- What local foods are most in demand? (0)
- What local foods are growing fastest? (0)
- How much do consumers spend on food in a week/month? (0)
- How do coupons/name brands affect consumers purchases? (0)



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- How much of the food consumed originates locally? (0)
- Is something processed locally but distributed internationally a “local” product? (0)
- How do local and imported food work together in best practice (for transportation and distribution)? (0)
- Do supermarkets sell to low-income groups? (0)
- How do you market NJ Fresh? (0)
- How much locally grown produce do you get? (0)

On Notecards

Consumption of local food

- How much food originates locally?
- How does local food compete with non-local food in retail?
- What is local food? Define
- What local foods are most in demand?
- What are the emerging local foods?

Consumers

- Where do they shop?
- How far are they willing to travel to shop?
- What are the things that matter most to them- quality? Value? Sustainability?
- How much do they spend on food in a week? Month/
- Do they do most of their shopping in conventional markets? Or elsewhere?

Transportation and distribution

- What’s the biggest challenge your company faces as it conducts the business of transporting and distributing local fresh food?
- How significant is imported food relative to the total food distributed in this area?
- What are the advantages/history that has resulted in this region being a major location for food processing?

Supermarket produce manager

- How much locally grown produce do you get and how is it delivered/identified?
- Do you distribute or sell specifically to low income groups in the area (working with WIC, Food Stamp offices, etc)
- How do you market “Jersey Fresh” for examples and what is in season?

Fresh food retailers biggest challenge?

- Do you as a fresh food retailer find it difficult to maintain profits and sales throughout the year, as growing seasons change?
- Do you expand your shelf inventory with imported packaged items to maintain sales?
- How do you make items affordable (to be able to compete with non-fresh)?
- How do you manager inventory to reflect quality, quantity, and freshness?

Food Industry



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- What is your basis for purchasing agricultural products (price, quality, volume, supply)?
- Has your demand for local product increased?
- Do you feel there needs to be more promotion of local products?
- Why would you not sell at a discount during the growing season?

How should we ask?

Processors/Farmers

Top Three

1. What are the greatest factors that limit your profit?
2. What resources do you rely on?
3. How does international competition affect your prices/profit margin?

On Board (with votes)

- What are the greatest factors that limit your profit? (6)
- What resources do you rely on? (4)
- How much does it cost to go from harvest to product? What is your profit margin? (2)
- How does zoning or other regulations affect your operation? (2)
- What training or technical assistance do you need? (2)
- How dependent are you on other local farmers (farms)? (2)
- Where do you sell and can you set your own prices? (1)
- How do you decide between food and non-food (biofuel) crops? (1)
- Demographic information of farmers (length of time farming, acres, family, business, gender, etc) (1)
- How do you decide what to grow? (0)
- Have you considered organic/free range options? (0)
- What factors can lead you to try another crop or variety of crop? (0)
- How have biofuels affected your crop choice? (0)
- Do livestock producers have difficulty accessing a slaughterhouse facility? Is it distance? (0)
- What type of farming do you do? How do you characterize your business? (0)

On Notecards

Vegetable Growers

- How often can you come into the city?
- What are the advantages of direct retail or wholesale?
- how easy is processing/cleaning vegetables for sale to markets, restaurants, institutions or other places?
- What is the profitability of different vegetables?

Biggest challenger to local farmers?

- What is your biggest challenge (rising fuel prices, access to a stable labor pool)?
- Price of land (availability of appropriate soils at reasonable cost), consumer awareness, cost of production, rising costs of fuel/materials?

Farmer's operation or local food system

- What crops/products do you grow?



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- Why do you grow them- for how long at your farm?
- What factors would influence you to try another crop/product/variety?

Local farmer or farmers market

- How define agriculture?
- How long have you been farming/growing/producing/breeding?
- How dependent on other local/regional farmers are you?
- How old are you?
- Did you grow up in a farming family?
- Are you able to “produce” your own commodities or do you need to ship your product elsewhere?
- Are you intentionally or unintentionally inhibited by local land use regulations?
- Are you part of a cooperative?
- How much acreage do you have/farm?

Fisheries, seafood producers/harvesters

- What species of fish do you harvest?
- What are the contributing factors in your operation?
 - Where do raw products come from?
 - Other resources/inputs?
 - Energy input?
- What are the trends in harvest over the last three decades? And future?
- “Achilles” heel in your operation?
- Do you feel vulnerable to climate change?
- Do you feel vulnerable to terrorism?
- What are your markets/purchases?

Raising Livestock

- How difficult is it to access a slaughtering facility?
- Is zoning/regulation an issue for you?
- Have you considered the free range/organic market? Barriers?
- Do you need training/technical assistance to produce value-added products like cheese, pot pie, ice cream, yogurt, etc?

How should we ask?

- Ask local farm bureau chapter to allow presentation at meeting
- Go to farmers markets and get farmers to fill out surveys
- Visit or call on off-hours (late or early)

Support Businesses

Top

1. Why would a credit or loan application be denied? What needs would not be fulfilled?
2. What are the future food preferences?
3. How will local food production affect support business?
4. What are the transportation and energy costs of the food industry?
5. What are the labor costs of the food industry?



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On Board (with votes)

- Why would a credit or loan application be denied? What needs would not be fulfilled? (3)
- What are the future food preferences? (2)
- How will local food production affect support business? (2)
- What are the transportation and energy costs of the food industry? (2)
- What are the labor costs of the food industry? (2)
- What is the impact of the Farm Bill on the food industry?
- How does crop insurance work? (1)
- Do equipment suppliers have a long or short haul? (1)
- What are the energy costs for equipment suppliers? (0)
- What are equipment suppliers detention costs? (0)
- What are the future locations of manufacturing plants? (0)
- What is the market demand for organic in the last 5-10 years (regionally and nationally)? (0)
- What are the trends and preferences of the food industry in general? (0)
- What are the trends in equipment purchases? (0)
- When does one collect crop insurance? How often? (0)
- How significant of an expense is crop insurance? (0)
- What crops need insurance and why? (0)
- How does crop insurance affect trucking/distribution? (0)
- How does crop insurance impact the plants grown? (0)
- Who makes the decisions/criteria for crop insurance? (0)
- Who will apply for farm credit? Why? (0)
- Why has food costs gone up? (0)
- What is value-added? (0)
- What % and \$ to what? (0)
- Who will receive loans and whats the criteria? By sector? (0)
- Are lenders for profit or non-profit? (0)
- What is the regional/national/total breakdown of lenders? (00)
- What are the barriers to accessing loans and credit? (0)

On Notecard

Seed Suppliers

- What are the sources for your seed?
- Is your business expanding?
- What is your market (who do you sell to)?
- Do you/would you sell genetically modified seed?
- Do you have a commitment to introducing new seeds each year?

Crop insurance

- When does a farmer collect crop insurance?
- How does crop insurance work?

Farm credit/lending

- For what purposes does a farmer get a loan?
- What farmers are likely to apply for loans?



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- Which farmers are likely to receive loans?
- Access:
 - Who lends (for profit, non-profit)
 - Credit criteria
 - Who benefits?
- Geographic breakdown
- Barriers to access:
 - % rejected
 - Small, local, agribusiness
- Are there any new models? (i.e., urban farming leasing)

What would you like to know about equipment suppliers?

- What do you expect to be manufacturing for agricultural producers in the next 5-10 years?
- How do you see higher gas prices impacting your business in the next 5-10 years?
- Where will your manufacturing plants be located in the next 5-10 years?

Food industry

- What do you expect the food preferences of the American public to be in the next 5-10 years?
- Do you expect that the strategy of producing food locally would impact your business? If so, how?
- How will higher gas prices effect your business in the next 1-3 years?

Ag industry

- How does it affect the trucking industry?
- What is the regional economic impact of the ag industry?
- How much of value-added products are locally made?
- What are the barriers to market? What gov policies are barriers?

How should we ask?

Policymakers/Non-profits

Top three

1. How can institutions (schools, hospitals) integrate local food production, education and provision?
2. How can we keep more food distributed within regional local markets to reduce fuel emissions and improve quality and accessibility?
3. What is the relationship between regional food producers and food banks? How to strengthen them?

On Paper (with votes)

- What is the relationship between regional food producers and food banks? How to strengthen them? (6)
- How can institutions (schools, hospitals) integrate local food production, education and provision? (5)



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- Do any of your government departments address food systems? Or access? If not, how could they? (5)
- (4)
- How to account for true cost of food in assistance programs (4)
- If you were in charge of policy, what would you put in place? (4)
- Does this land trust have policies that restrict ag due to environmental concerns? (3)
- How can we protect a safe and adequate water supply for agriculture within Delaware Valley region and NJ? (2)
- How are trade agreements impacting local agriculture? (1)
- What role do land trusts have in the food system? (1)
- What programs would help make the food industry more energy efficient and sustainable? (1)
- What is the scope, size, success, history of this government program? (1)
- What are your transit routes? (0)
- How do food banks obtain food (i.e. the supply process, where come from?) (0)
- How can food banks best utilize glut products? (address seasonal variations) (0)
- How much of the inventory of food banks is fresh and how is it managed? (0)
- How do non-members benefit from this land trust? (0)
- What are your priorities concerning the food system? Is the food system even on the radar? (0)

On Notecards

Local non-profit (food banks, nutrition advocates, sustainability advocates)

- For food banks:
 - What is their relationship to local/regional food producers (beyond City Harvest)?
 - How might these relationships grow/strengthen to address seasonal variation?
 - What is the process by which you obtain food? (supply, who from, how much, seasonality)
 - How do you maintain inventories? (infrastructure, fresh v. shelf, inventory control)
- For nutrition advocates:
 - How can local schools and other institutions with cafeterias integrate local food production, education, provision?
- How can DVRPC's food system indicators help non-profits, public institutions, firms and policy makers make informed decisions about local food sourcing?

Land trusts

- How much of your organization's efforts involve farmland preservation?
- Does your organization have policies or advocate policies that restrict farming operations on preserved farmland due to environmental concerns?
- What is the interaction, if any, between your organization local farmers on land use policies?
- What do you do and how do you do it?
- What role do you currently have in the food system? If none, can you mission incorporate food issues?
- How do you benefit people that do not belong to your trust?

Government program or policy best practice

- Is your local government engaged in any food system initiatives/programs?
- How do you propose to mitigate rising food costs in your community?



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- How could your government operations be structured/modified to facilitate the task of addressing food policy?
- What city/county departments deal with the food system?
- How have you dealt with improving food accessibility?
- Do local codes promote food system protection strategies like urban farming and farmland protection?
- What are your priorities concerning the food system? Is the food system even on the radar?

USDA program like to know more about?

- PA Preferred
- What is the scope of each program (size, \$, reach, success, history)?
- What would you like to put in place if you were in charge of pollic?
- What issue in your field of work do you worry most about?

Congressional Rep

- Based on projected population growth within the Delaware Valley and NJ, can the region meet its food supply safely and affordably?
- How (with what programs) can we keep more food distributed within regional local markets to reduce fuel emissions and improve quality and accessibility?
- How can we protect a safe and adequate water supply for agriculture within Delaware Valley region and NJ?
- Regional food access: what is being done to adjust food assistance program funding to provide more resources for the real cost of food (i.e., food is not supposed to be cheap; markets are manipulated; can WIC, food stamps, etc. reflect the true cost of food)?
- What research is being funded to support alternative fuel development that is not based on agribusiness (soy and corn crops)?
- How are trade agreements impacting local agriculture?
- How are state funded agricultural education/coop extension training future farmers and agribusiness leaders in sustainability?

Food industry

- What are the transit routes that contribute to routes [sic] throughout your region (freight, truck, boat)
 - What is the energy/pollution impact?
- What policies can you envision would help make the food industry more energy efficient or “green”?
- Are you aware of your area’s food industry’s “local” use? How can you make policies to increase it/
- Who determines the definition of “organic”?
 - Industry or government?
 - Are you satisfied with it?
- How many are international, national, regional, local?

How should we ask?

- Discussion due to complexity of the issue
- One-on-one discussion to avoid peer influence
- Go to them



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- Varies according to question
- Avoid phone- in person conversation may lead to better preparation
- Ask informer preference